



# Mutual Value Investments SA Data Protection Notice

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June 2024

## Data Protection Notice

Mutual Value Investments SA (CHE-462.968.059) is a Swiss corporation (*société anonyme*) having its registered office at c/o Corrafid, Rue de la Corraterie 26, 1204 Geneva ("**MVInvestments**"). MVInvestments' activity is to buy, sell and manage participations in any Swiss or foreign companies, including the coordination, the financing and the management in relation with these acquisitions. In doing so, the company fosters a model of value creation that generating mutual prosperity for all stakeholders — while impacting positively society and the environment. The company also offers to these companies and to other economic players services and tools that enable the implementation of such model of investment. (the "**Tools**").

This Data Protection Notice explains how we process your personal data.

In this Data Protection Notice "**we**" refers to MVInvestments which acts as a data controller (alone or jointly determining the purpose and means of processing).

As a data controller, we are responsible for collecting and processing some of your personal data in relation to our activities and in particular in the course of the Tools we use, or as part of our existing and/or prospective business relationship with you, or your use of our website (<https://mutualvalue.investments/> hereafter referred to as "**Website**") (together referred to as "**Relationship**"). The purpose of this Data Protection Notice is to let you know which personal data we collect about you, the reasons why we use and share such personal data, how long we keep them, what your rights are and how you can exercise them. Further information may be provided where necessary when you apply for a specific service or when you have access to a Tool we use.

We kindly ask you to read this Data Protection Notice. Please note that we may also process personal data in respect of an individual who is related to you, such as any director, officer, employee, authorized signatory or any representative, within the course of our Relationship with you. In this context, we ask that you liaise with and transmit this Data Protection Notice to such individuals related to you, respectively the information contained therein.

### 1. Which personal data do we process about you?

We collect and use your personal data to the extent necessary in the context of our Relationship. We may collect various types of personal data about you depending on the nature of the particular service we provide, or of our Relationship with you, including:

*When you visit our Website:*

- IP address;
- data relating to your habits and preferences;
- data which relates to your use of our services, in particular information about the browser or device you use to access our Website, how you use our Website and the pages you visit, traffic and location data; and
- cookie information (e.g., cookies and similar technologies on websites and in emails – for more information, please refer to our Cookies Policy).

*When you register for our newsletter:*

- full name, email address, organization, sector of activity, country.

*When you have access to a Tool we use as a user:*

- full name, nationality, place and date of birth, gender;
- address, localization data (GPS data), email address, phone number;

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- household information (such as number of children, amount of income);
- education and employment information (e.g., level of education, function);
- data from your interactions with us (e.g., our meetings, calls, chats, emails); and
- in some cases, we may collect personal data that qualifies as sensitive data such as: personal data related to your racial or ethnic origins, political opinions, religious or philosophical beliefs, genetic data, data concerning your sexual orientation or data relating to criminal convictions and offences.

Once your Personal Data have been processed in the context of the Tool to which you have access, we will anonymize most of your Personal Data when they are no longer necessary for the purpose of the Tool. We will then only keep your contact details in order to identify you as a user of the Tool and in order to reach out to you if necessary as part of the Tool.

*When you enter into a contract with us:*

- organization;
- full name, nationality, gender;
- address, email address, phone number;
- financial data (e.g., credit card number, billing details); and
- data from your interactions with us (e.g., our meetings, calls, chats, emails).

thereafter referred to as "**Personal Data**".

## 2. From which source do personal data originate?

The data we use about you may be directly provided by you or obtained from other sources, such as:

- publications/databases made available by official authorities;
- databases made publicly available by third parties;
- an entity we provide services to;
- research partners and survey providers when you are a user of a Tool we use; and
- any other third parties including, without limitation, recruitment and survey agencies.

## 3. Specific cases of personal data collection

In certain circumstances, we may collect and use Personal Data of individuals with whom we have, could have, or previously had, a Relationship including:

- visitors to our Website, including subscribers to our newsletters;
- followers of our social networks; or
- attendees of our events.

## 4. Why and on which basis do we use your personal data?

### 4.1. To comply with our legal and regulatory obligations

We use your Personal Data to comply with legal and regulatory obligations, which may include laws outside the country you are located in, including to:

- set up security measures in order to prevent abuse and fraud;
- identify and manage risks (e.g., cyber risks); and

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- reply to an official request from an administrative or judicial authority which may include authorities outside your country.

### **4.2. To perform a contract with you or to take steps at your request before entering into a contract**

We use your Personal Data to enter into and perform our contracts, including to:

- provide and perform our obligations with respect to the services we provide (e.g., using Tools, providing advice to businesses, management consultancy, provision of education programs);
- enforce applicable terms of contracts;
- assist you and answer your requests as a necessary part of the provision of our services to you, and to administer account(s) and manage our Relationship with you; organize events, including conferences, workshops and roundtables, to which you registered for or are interested in; and
- send administrative information, such as change of our terms, conditions and policies.

### **4.3. To fulfil our legitimate interest**

We use your Personal Data in order to deploy and develop our services, to defend our legal rights and to protect our privacy and safety including:

- to manage our IT infrastructure and ensure the security of our IT systems;
- to develop our Relationship with you and to improve the quality of our services;
- to analyze and predict certain of your personal preferences, interests and behavior based on your use of our services and Website (profiling) in order to personalize and improve our offering of services;
- to undertake data analytics, including market research, analyses and surveys, to learn more about how you interact with our Website, services and advertising;
- provide you with information regarding our services (including consultancy services and education programs), event we organize ourselves or in collaboration with our partners (including conferences, workshops and roundtables) and our publications or publications we sponsor;
- to establish, exercise and/or defend actual or potential legal claims, investigations or similar proceedings.

### **4.4. To respect your choice if we request your consent for specific processing**

We use your Personal Data based on your consent:

- when you are a user of a Tool we use.

If we need to carry out further processing for purposes other than those above in Section 4, we will inform you and, where necessary, obtain your consent.

## **5. Who do we share your personal data with?**

Personal Data may be disclosed to third parties in connection with the services we are providing to you. The recipients of any such information will depend on the services that are being provided. In order to fulfill the aforementioned purposes and subject to any confidentiality restriction we may have expressly agreed with you, we may disclose your Personal Data to:

- Economics of Mutuality (EOM) Foundation and Human Flourishing Foundation, two Swiss public interest foundations that own MVIInvestments and are involved in business research,

- education and advocacy;
- research partners, survey providers and other suppliers with whom we collaborate in order to render our services and use our Tools;
- other partners as part of the provision of our services and planification of our events (e.g., think-tanks, foundations, organisms involved in academic research, education and publication);
- service providers which perform services on our behalf, such as payment, marketing, communication or event planning services and/or platform providers, third party storage providers, third party IT providers;
- management schools and universities providing the education programs we offer or sponsor;
- financial, taxation, regulatory or judicial authorities, state agencies or public bodies, upon request and to the extent permitted by law;
- certain professionals such as lawyers, notaries or auditors; and
- to any other persons as agreed with you.

We reserve the right to make Personal Data accessible to other recipients, as disclosed to you from time to time or if required by applicable laws or requested by a competent authority.

### **6. Are personal data transferred outside of our jurisdiction of incorporation?**

In the circumstances mentioned in Section 5 above, we may transfer your Personal Data to third parties for the relevant personal data processing.

Such transfers may include the transfer of Personal Data to jurisdictions that: (i) ensure an adequate level of data protection for the rights and freedoms of data subjects; (ii) benefit from adequacy decisions as regards their level of data protection (e.g. adequacy decisions from the European Commission or the Swiss Federal Data Protection and Information Commissioner); or (iii) do not benefit from such adequacy decisions and do not offer an adequate level of data protection. In the latter case, we will ensure that appropriate safeguards are provided, e.g. by using standard contractual data protection clauses established by the European Commission.

To obtain details on the applicable safeguards, please contact us at the address provided under Section 10 below.

### **How long do we keep your personal data for?**

We will retain your personal data for the longer of:

- the duration of our Relationship with you or your organization;
- the purpose of a Tool that we use and to which you have access;
- the period required by applicable law or contractual obligations; or
- such other period necessary for us to meet our operational obligations, such as proper account maintenance, facilitating client relationship management and responding to legal claims or regulatory requests.

Most Personal Data that we collect is kept for the duration of our Relationship with you or of the Tool we use plus a specified number of years after the end of the Relationship or the Tool, or as otherwise required by applicable law. If you would like further information on the period for which

your Personal Data will be stored or the criteria used to determine that period please contact us at the address provided under Section 10 below.

### 7. What are your rights and how can you exercise them?

Subject to the local data protection laws which apply to your situation and other applicable regulations, you have the following rights:

- *To access*: you can obtain information relating to the processing of your Personal Data, and a copy of such Personal Data.
- *To rectify*: where you consider that your Personal Data is inaccurate or incomplete, you can require that such Personal Data be modified accordingly.
- *To erase*: you can require the deletion of your Personal Data, to the extent permitted by applicable law.
- *To restrict*: you can request the restriction of the processing of your Personal Data.
- *To object*: you can object to the processing of your Personal Data, on grounds relating to your particular situation.
- *To withdraw your consent*: where you have given your consent for the processing of your Personal Data, you have the right to withdraw your consent at any time.
- *To data portability*: where legally applicable, you have the right to have the Personal Data you have provided to us be returned to you or, where technically feasible, transferred to a third party;
- *To file a complaint* in relation to the processing of your Personal Data with the competent data protection supervisory authority.

In Switzerland, the competent data protection supervisory authority is:

Office of the Federal Data Protection and Information Commissioner FDPIC  
Feldeggweg 1  
CH - 3003 Berne  
Website: <https://www.edoeb.admin.ch/edoeb/en/home.html>

Even if you object to the processing of your Personal Data, we are nevertheless allowed to continue the same if the processing is (i) legally mandatory, (ii) necessary for the performance of a contract to which you are a party, (iii) necessary for the performance of a task carried out in the public interest, or (iv) necessary for the purposes of the legitimate interests we follow, including the establishment, exercise or defense of legal claims. We will not, however, use your Personal Data for direct marketing purposes if you ask us not to do so.

If you require further information, or if you wish to exercise the rights listed above, please contact us at the address provided under Section 10 below.

### 8. Do we rely upon automated decision-making or profiling?

We do not use automated decision-making in connection with your Personal Data. Should we do so in the future, we shall comply with applicable legal and regulatory requirements.

When we collect your Personal Data as part of a Tool to which you have access, the processing of your Personal Data in this context may lead to the elaboration of profiles. Such profiling aims at evaluating the personal aspects relating to you, in particular to analyses aspects concerning your

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performance at work, economic situation, health, personal preferences or interests, location or movements, in the context of such Tool. However, once your Personal Data have been processed in the context of the Tool to which you have access, we will anonymize most of your Personal Data when they are no longer necessary for the purpose of the Tool.

When you are a client or user of our Website, we may as well process automatically your Personal Data to assess certain characteristics such as your personal preferences, interests and behavior based on your use of our services and Website (profiling) in order to provide you with personalized information on our products and services.

### **9. How can you keep up with changes to this Data Protection Notice?**

We may need to update this Data Protection Notice from time to time. We will publish updates of this Data Protection Notice on our Website and, as the case may be, inform you of any material changes through our usual communication channels.

### **10. How to contact us?**

If you have any questions relating to our use of your Personal Data under this Data Protection Notice, please contact us as follows: [dataprivacy@eom.org](mailto:dataprivacy@eom.org)

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